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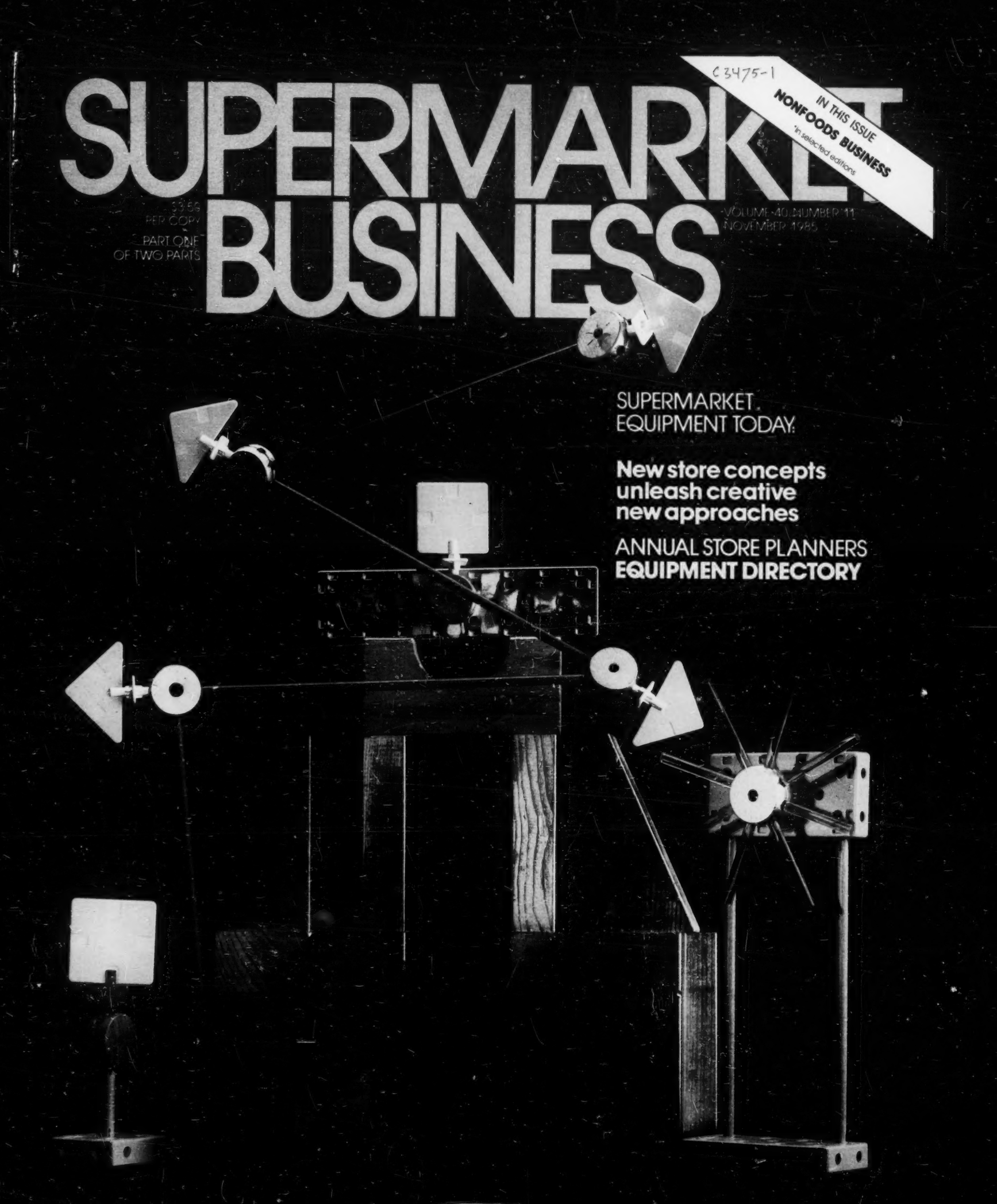
SUPERMARKET BUSINESS

$3.50
PER COPY
PART ONE
OF TWO PARTS

VOLUME 40, NUMBER 11
NOVEMBER 1985

IN THIS ISSUE
NONFOODS BUSINESS
*in selected editions



SUPERMARKET
EQUIPMENT TODAY:

New store concepts unleash creative new approaches

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PRODUCTION MANAGER
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914-528-1369

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MIDWEST REGIONAL SALES MANAGER
George Stevens

Fieldmark Media, Inc.
3530 W. Peterson Ave.
Chicago, Ill. 60659
312-583-1318

WEST COAST
Sue Marriit

Fieldmark Media, Inc.
16133 Ventura Blvd., Suite 700
Encino, Calif. 91436
818-783-5888

FIELDMARK MEDIA, INC.
25 W. 43rd Street, Suite 707
New York, N.Y. 10036
212-354-5169

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COVER PHOTOGRAPHY
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SUPERMARKET BUSINESS Magazine (ISSN 0196-5700) is published monthly by Fieldmark Media, Inc., 25 W. 43rd St., New York, N.Y. 10036. Telephone: 212-354-5169. Circulated free of charge to grocery retailers and wholesalers. U.S. subscriptions $35 per year; Canada, $40 per year. Foreign subscriptions $48 (seamail), $198 (airmail), per year. Single copies $3.50 except Consumer Expenditures Study (September issue) $20 per copy. (Discount prices available on multiple purchases.)
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Second class postage paid at New York, N.Y., and additional mailing offices.

BPA ABP American Business Press Inc.

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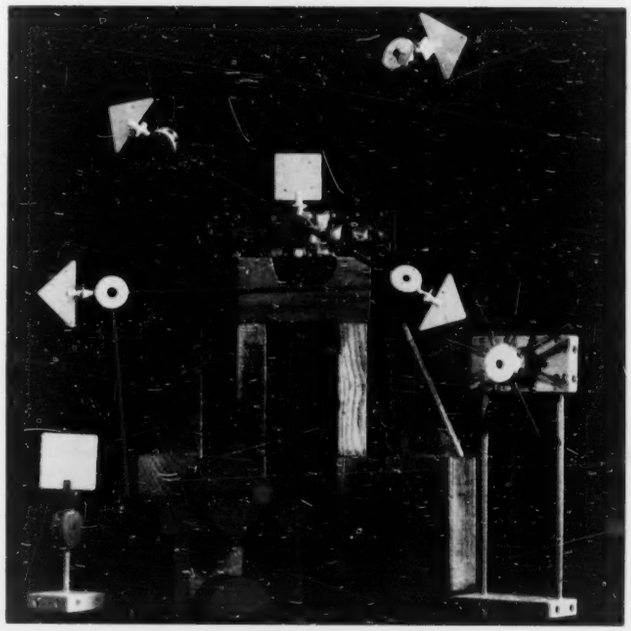

STORE EQUIPMENT TODAY: NEW STORE CONCEPTS UNLEASH CREATIVE NEW APPROACHES 27
BOB HUGHES, MANAGING EDITOR

The revolution in supermarket design continues, as forward-thinking, competitive independent supermarket operators are joining the fight for the shoppers' dollars, where even as early as a year ago large chains, with lots of money, dominated design innovations. Store operators are using design as a total marketing concept, and that also affects the way equipment is being designed. The standard-built era is still here, but the heat is on from Europe in the sleek, custom built arena.

V. RICHARDS CHARMS MILWAUKEE 32
CAROL FENSHOLT

Milwaukee's first truly upscale supermarket is wowing shoppers with its blend of style, architectural charm, winning service—there's even good music piped in—and warmth.

ANNUAL STORE PLANNERS EQUIPMENT DIRECTORY 41

This year, our listing of the major equipment suppliers to the industry has been greatly expanded and revised to provide the most complete guide we can.

NEW EQUIPMENT: A SAMPLER 53

NONFOODS BUSINESS* FACING PAGE 62
IN UPSCALE HBA DEPARTMENTS, THEFT TAKES NO HOLIDAY

Upscale HBA departments attract more than just affluent customers: they also bring in a better class of shoplifter. And when the losses are counted up, the bottom line can hurt.

*in selected editions only
ALSO IN NONFOODS BUSINESS: SAMI UPDATE

CHECK OUT: DON ADAMS GETS SMART, GOES TO WORK IN SUPERMARKET 68

Comedian Don Adams stars in a new television series about the hilarious exploits of a—would you believe?—supermarket store manager.

OTHER FEATURES AND COLUMNS

EDITOR'S VIEW 5
TRADESCAN 9
WASHINGTON BRIEF 15
TECHNOLOGY 16
PRODUCE 59
NEW PRODUCTS 62
CONTEST WINNERS 64
NOVEMBER'S CONTEST 65

SAMI UPDATE:

HBA Sales Continue To Be Strong

BY ALAN MILLER, JR.

In this issue, we double up on the reporting of trends of unit sales of health and beauty aids categories, since SAMI offers thirteen 28-day reporting periods a year, and SUPERMARKET BUSINESS is published 12 times a year.

The mid-August and mid-September periods make a good combination, since in many respects there were similarities in sales trends. After hitting a high rate of gain of 5.0 percent in July and becoming the product department with the highest tonnage gain during the period ending Aug. 16, the HBA gain rate rose still further to 5.4 percent and once again exceeded the growth rate of refrigerated foods.

However, during the period ending Sept. 13, refrigerated foods reclaimed the number-one growth rate spot with an advance of 5.2 percent, compared with an increase of 2.9 percent for health and beauty aids. In both four-week reporting periods, there were plus signs registered for each of the eight HBA product groups reported by SAMI.

Mousses leading

During the August period, 32 HBA product categories had four-week unit sales gains, while 18 categories had losses. In the September period, the score was 34 to 16, gainers over losers. In the more recent period, the highest gain rate for a category was 85.8 percent, in the case of hair setting needs, which has been expanded dramatically by the proliferation of hair styling mousse entries by virtually all hair care manufacturers.

Since many of these brands are passing their first anniversary of launching, the rate of gain is expected to fall to more modest levels in future reports. The highest rates of decline during the September reporting period were found among low volume categories: -19.9 percent for proprietary tranquilizers, a perennial loser, and -34.7 percent for suntan lotion/suntan oil, which has low volume seasonally each year during the September reporting season.

In the August period, only one baby needs category had a loss rate, infant clothes, which is showing a 10 percent decline on an annual basis. In the September period, both infant clothes and baby oils, creams & lotions were in the minus column. There were gains of more than five percent for baby powders and nursing supplies in each of the two reporting periods.

Stick up

In the personal deodorant product group, the continuing growth of stick deodorants and anti-perspirants has taken volume from sprays, roll-ons and creams, and these three categories registered declines for both the most recent SAMI reporting periods and the year as a whole.

The loss among spray deodorants has also been triggered by the weakness of body sprays, which have not enjoyed continuing consumer favor. Also exhibiting strong sales vitality in both reporting periods were deodorant and talcum powders, where new line extensions of J&J's Shower to Shower have increased sales, and in foot deodorants and athlete's foot remedies, where high rates of gain have been achieved by two brands— Tinactin and Micatin. There were less dramatic gain rates for feminine hygiene deodorants and douches.

The gain rates for the two first aid categories tracked by SAMI combined was about the same—2.7-2.8 percent—in the two periods under scrutiny. In the August period there was a 3.3 percent drop in unit sales of first aid antiseptics but a strong recovery to 8.4 percent was registered in the succeeding period. First aid products (cotton balls, bandages, etc.) had a lower rate of gain (1.2 percent) in the more recent period than in August (4.7 percent).

Shampoos decline

In the hair care needs product group, the weakness during an eight-week interval was centered on three categories. Unit volume of shampoos declined in both periods. Home permanent kits fell 7.9 percent in the August period, but rebounded to a gain of 5.0 percent in September. Conversely, unit food store sales of hair conditioning rinses moved from a gain of 5.4 percent in August to a loss of 6.8

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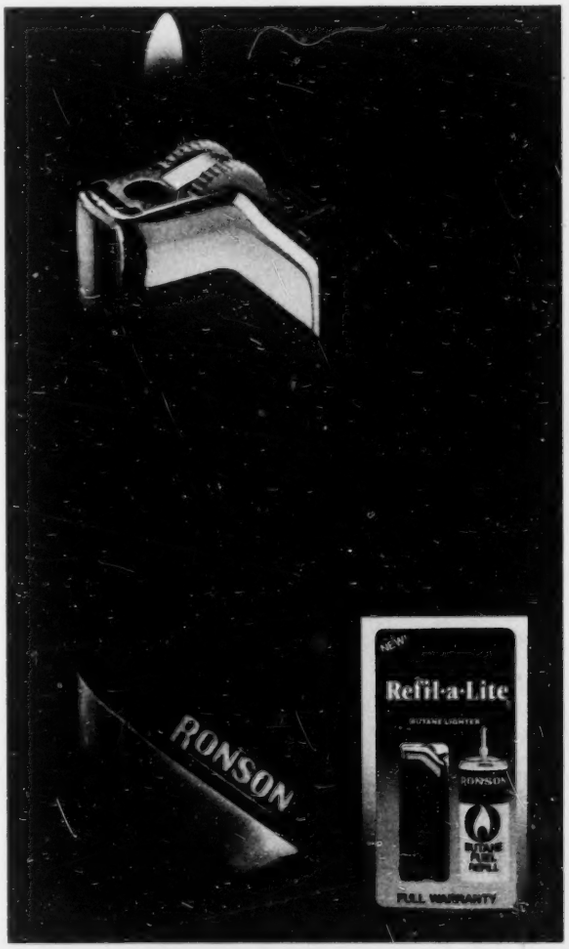

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percent in September.

These two September losses in high volume categories held back the product group gain to less than a percentage point (0.6 percent). Keeping this total in the plus column for September were double-digit gains for hair coloring (12.9 percent), hair spray (12.3 percent) and hair dressing needs (10.8 percent).

Three oral hygiene categories had four-week losses in September versus the corresponding periods a year ago. Unit sales of denture adhesives fell 5.8 percent and these items show a loss in the 12 weeks (-5.6 percent), as well as full year (-1.7 percent).

Toothpastes pump up sales

Denture cleaners had a 4.6 percent gain in August but a loss of 0.6 percent in September. Mouthwash sales fell slightly in both four-week periods. Toothpaste sales have recovered as a result of strong sales trends for the pump dispensers. Early in the year, high year-ago sales of deal merchandises created volume declines. Toothbrush volume rose just over two percent in both periods.

Among the 14 proprietary remedy categories measured by SAMI, the most significant loss rates are found in the internal analgesics and appetite suppressant categories. In the former distress area, some of the weakness can be attributed to a failure of ibuprofen brands to achieve target goals and a poor sales showing among aspiring brands and arthritic specialties.

It is suggested that the sales declines for appetite suppressants can be accounted for by switches in consumer purchasing to diet foods found in a number of other SAMI categories.

Coughs up

Cold tablets and cough remedies continue to record increases, while nasal sprays-drops-inhalers encountered losses in both periods. Synthetic vitamins are also experiencing continuing weakness, but at a lower level than earlier in the year. Eye care products continue to demonstrate standout performance with gain rates in the 26 to 29 percent range of late. Sales of laxatives and stool softeners rose in both periods.

In August, two categories of shaving needs showed negative trends—after shave lotions with a four-week decline of 3.9 percent and razor blades, with a loss of 0.8 percent. However, as of the Sept. 13 reporting period, all five categories in this product group were in the plus column, with gains ranging from a high of 8.6 percent for after shave lotions to just 1.5 percent for razor blades, where continued sales vitality among disposable razors and the influx of sales from Gillette's new Atra

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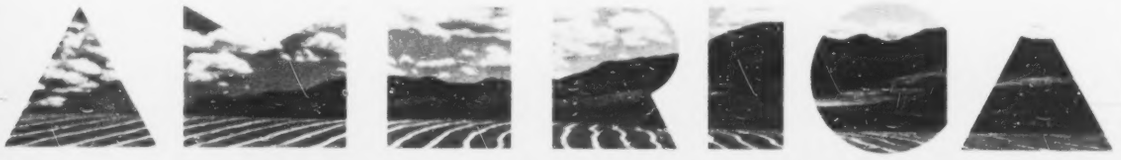

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HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

PRODUCT GROUP AND CATEGORY	% CHANGE VS. YEAR AGO 4 WEEKS ENDING 7/19/85	4 WEEKS ENDING 8/16/85	4 WEEKS ENDING 9/13/85
BABY NEEDS	**– 1.8%**	**+ 4.4%**	**+ 2.1%**
Baby Powders	– 9.5	+ 5.3	+ 5.5
Baby Oils, Creams & Lotions	– 0.9	+ 4.5	– 0.1
Infant Clothes	– 17.9	– 5.9	– 9.4
Nursing Supplies	+ 6.8	+ 6.6	+ 5.3
DEODORANTS	**+ 2.1%**	**+ 2.0%**	**+ 6.2%**
Sprays	– 1.8	– 5.5	– 2.6
Roll-Ons	– 13.1	– 14.7	– 6.9
Stick Deodorants & Pads	+ 18.3	+ 18.3	+ 22.9
Creams	– 9.5	– 7.9	– 7.6
Deodorants & Talcum Powders	+ 10.0	+ 29.2	+ 22.4
Feminine Hygiene Deodorants	+ 6.2	+ 7.5	+ 0.3
Foot Deodorants & Athlete's Foot Remedies	+ 10.3	+ 18.3	+ 18.5
Feminine Douches	+ 7.7	+ 10.8	+ 7.0
FIRST AID	**– 0.1%**	**+ 2.7%**	**+ 2.8%**
Antiseptics	– 3.6	– 3.3	+ 8.4
First Aid Products	+ 1.2	+ 4.7	+ 1.2
HAIR CARE NEEDS	**+ 11.5%**	**+ 7.1%**	**+ 0.6%**
Shampoos	+ 5.8	– 1.2	– 7.2
Hair Sprays	+ 12.1	+ 13.5	+ 12.3
Hair Conditioning Rinses	+ 10.4	+ 5.4	– 6.8
Hair Setting Needs	+ 148.3	+ 112.4	+ 85.8
Home Permanent Kits	– 13.0	– 7.9	+ 5.0
Hair Coloring	– 0.4	+ 10.5	+ 12.9
Hair Dressing Needs	+ 9.7	+ 12.6	+ 10.8
ORAL HYGIENE	**+ 9.6%**	**+ 10.5%**	**+ 3.5%**
Toothpastes & Powders	+ 14.3	+ 16.9	+ 5.7
Mouthwashes	+ 2.3	– 0.8	– 1.0
Breath Fresheners	+ 1.6	+ 5.2	+ 5.0
Denture Cleaners	– 4.7	+ 4.6	– 0.6
Denture Adhesives	– 5.7	– 5.4	– 5.8
Toothbrushes	+ 5.5	+ 2.2	+ 2.3
PROPRIETARY REMEDIES	**– 0.1%**	**+ 1.5%**	**+ 1.6%**
Antacids	+ 3.5	+ 3.9	+ 3.7
Internal Analgesics	– 7.4	– 8.9	– 5.9
External Analgesics	– 10.1	+ 4.8	+ 3.6
Cold Tablets	+ 11.2	+ 10.6	+ 6.6
Nasal Sprays—Drops—Inhalers	+ 0.8	– 0.6	– 4.4
Chest Rubs	+ 2.1	– 1.2	+ 4.2
Cough Remedies	+ 4.6	+ 6.0	+ 0.3
Laxatives	+ 1.7	+ 3.1	+ 3.5
Sleeping Aids	+ 11.4	+ 12.4	+ 5.0
Tranquilizers	– 26.5	– 18.4	– 19.9
Synthetic Vitamins (Natural Vitamins, Minerals, Supplements)	– 0.8	– 0.1	– 2.3
Eye Care Products	+ 27.8	+ 25.8	+ 29.0
Appetite Suppressants	– 15.1	– 6.6	– 9.6
SHAVING NEEDS	**– 0.3%**	**+ 1.4%**	**+ 2.8%**
Shaving Creams	+ 4.5	+ 8.4	+ 4.6
Pre-Shave Lotions	+ 3.0	+ 5.5	+ 2.3
After-Shave Lotions	– 4.1	– 3.9	+ 8.6
Razor Blades	– 1.8	– 0.8	+ 1.5
Razors & Blades	+ 4.1	+ 9.1	+ 2.7
SKIN CARE AIDS	**+ 17.3%**	**+ 19.0%**	**+ 13.3%**
Hand & Body Creams & Lotions	+ 20.8	+ 16.2	+ 4.1
Facial Preparations	+ 27.3	+ 44.0	+ 43.2
Lip Care Products	+ 22.9	+ 31.4	+ 29.1
Suntan Lotions & Oils	+ 15.0	– 3.9	– 34.7
Cosmetic & Medicated Skin Aids	+ 4.6	+ 8.1	+ 6.4
TOTAL ALL CATEGORIES	**+ 5.0%**	**+ 5.4%**	**+ 2.9%**

Plus has caused a continuing loss situation to come to an end.

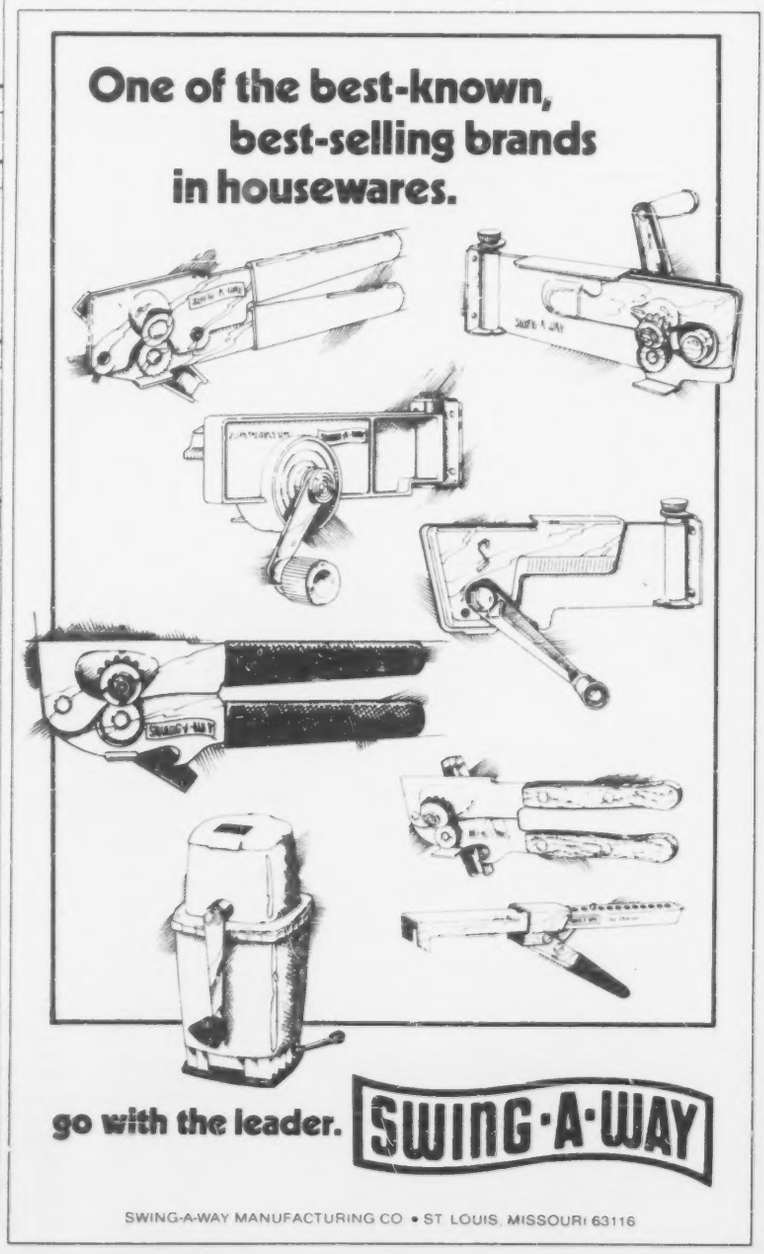
Shaving creams have been faring well of late since corresponding year-ago sales periods no longer reflect high levels of consumer deals, which caused unit volume losses earlier this year.

Facial preparations

The rate of gain among skin care needs has declined from + 19.0 percent in August to 13.3 percent in the more recent four-week period. The highest growth rates were found among facial preparations, where new products such as 3M's Buf-Puf have caused category volume to expand and also in the lip care products category, where all major brands are enjoying sales increases, particularly Vaseline, with new items in national distribution.

The gain rate among hand & body creams & lotions has subsided in the most recent period and moved from + 16.2 percent in August to just 4.1 percent in the mid-September reporting period. Sales of cosmetic and medicated skin aids continue firm with increase of 8.1 percent and 6.4 percent respectively in the August and September tracking.

Hopefully, the bullish trends encountered in recent months will carry through during the final periods of 1985. As of the year ending September 13, 1985, dollar sales of all health and beauty aids combined measured by SAMI are 7.5 percent ahead of sales in a similar year ago period. This is the highest percentage gain in dollars of any SAMI product department. In 52-week units, the gain rate is 2.1 percent, which is surpassed by refrigerated foods, recording a gain of 3.2 percent.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